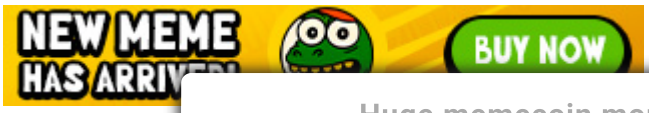

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Global Poultry Industry Report 2025: Trends, Challenges and Future Outlook Across the Value Chain

19 November 2025 by ESS Team

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Executive Summary: State of the Global Poultry Industry

The global poultry industry has reached unprecedented scale, with production exceeding **138 million metric tons** valued at **$385 billion** in 2025, maintaining its position as the **fastest-growing animal protein sector**. The industry has demonstrated remarkable resilience, achieving **4.2% compound annual growth** despite navigating significant challenges including **avian influenza outbreaks, input cost inflation, and shifting consumer preferences**.

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Poultry continues to gain market share against other protein sources, driven by its **competitive pricing, nutritional profile, and versatility**. The sector supports approximately **25 million jobs globally** across production, processing, and distribution, while providing affordable protein to billions of consumers. The industry's evolution is characterized by **increasing vertical integration, technological advancement, and growing emphasis on sustainability** across the value chain.

Market Size and Regional Analysis

Global Production Metrics 2025

- **Total Production:** 138.4 million metric tons
- **Market Value:** $385 billion
- **Annual Growth Rate:** 4.2%
- **Per Capita Consumption:** 17.8 kg globally
- **Export Volume:** 14.2 million metric tons

Regional Production Leaders

Region	Production (Million MT)	Growth Rate	Key Characteristics
Asia-Pacific	58.2	5.1%	Rapid urbanization, growing middle class
Americas	48.6	3.2%	Highly integrated, export-oriented
Europe	21.4	2.1%	Strict regulations, quality focus
Middle East/Africa	10.2	6.3%	Emerging markets, investment growth

Country-Level Performance

- **United States:** 23.1 million MT (Leader in efficiency and exports)
- **China:** 21.8 million MT (Largest producer, growing consumption)
- **Brazil:** 15.3 million MT (Leading exporter, cost competitive)
- **European Union:** 13.8 million MT (Quality standards, sustainability focus)
- **India:** 5.2 million MT (Rapid growth, domestic market focus)

Value Chain Deep Dive

Breeding and Genetics

The poultry genetics sector is dominated by three major companies controlling **97% of parent stock** for broilers:

- **Aviagen Group:** 42% market share, focus on balanced performance traits
- **Cobb-Vantress:** 38% market share, emphasis on feed efficiency
- **Hubbard:** 17% market share, specialized regional varieties

Key Developments:

- Genomic selection accelerating genetic progress by 30%
- Disease resistance traits gaining priority post-avian influenza
- Customized genetics for specific market requirements
- Investment in gene editing technologies for disease resistance

Feed Production and Nutrition

Poultry feed represents **65-70% of production costs**, driving intense focus on efficiency:

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- **Global Feed Consumption:** 650 million metric tons annually
- **Cost Structure:** 50% corn, 25% soybean meal, 25% other ingredients
- **Innovation Areas:** Alternative proteins, enzyme supplements, precision nutrition
- **Sustainability Focus:** Reducing environmental footprint of feed ingredients

Production Systems

- **Industrial Integration:** 85% of global production in integrated systems

- **Contract Farming:** Growing model in developing markets
- **Alternative Systems:** Organic, free-range representing 8% of market
- **Technology Adoption:** Automation, environmental controls, data analytics

Processing and Distribution

- **Automation Level:** 65% of new plants highly automated
- **Value-Added Growth:** 12% annual growth in further processed products
- **Cold Chain:** Advanced logistics enabling global trade
- **Food Safety:** HACCP and traceability systems becoming standard

Key Industry Players and Market Concentration

Global Leaders

Company	Revenue 2025	Production Volume	Geographic Reach
JBS S.A.	$42.8B	8.9M MT	Global
Tyson Foods	$38.2B	7.2M MT	Americas, Asia
BRF S.A.	$21.4B	5.1M MT	Global
Cargill Protein	$18.9B	4.3M MT	Global
LDC (LDC Poultry)	$12.3B	2.8M MT	Europe, Middle East

Regional Champions

- **Asia:** CP Foods, New Hope Liuhe, Japfa
- **Europe:** LDC, Plukon Food Group, 2Agriculture
- **Middle East:** Almarai, Al Watania Poultry
- **Africa:** Astral Foods, RCL Foods

Market Concentration Trends

- **Top 10 Companies:** Control 42% of global production

- **Regional Variation:** Higher concentration in developed markets
- **Vertical Integration:** Increasing control across value chain
- **M&A Activity:** Continued consolidation driving scale efficiencies

Emerging Technologies and Innovation

Digital Transformation

- **Precision Farming:** IoT sensors monitoring bird health and environment
- **Predictive Analytics:** AI forecasting production outcomes and market trends
- **Blockchain:** Supply chain transparency from farm to consumer
- **Robotics:** Automated processing and packaging systems
- **Digital Marketplaces:** B2B platforms connecting buyers and sellers

Biotechnology Advances

- **Vaccine Development:** mRNA vaccines for avian influenza protection
- **Feed Additives:** Enzymes and probiotics improving gut health
- **Genetic Tools:** CRISPR for disease resistance and quality traits
- **Alternative Proteins:** Insect meal and single-cell proteins in feed

Production Innovations

- **Environmental Controls:** Advanced ventilation and cooling systems
- **Water Management:** Recycling and efficiency technologies
- **Energy Solutions:** Solar power and biomass energy integration
- **Waste Valorization:** Manure-to-energy and nutrient recovery

Sustainability and Environmental Impact

Environmental Footprint

- **Greenhouse Gases:** 8-10% of agricultural emissions, 0.8% of global total
- **Water Usage:** 1,500-2,000 liters per kg of meat produced
- **Land Use:** More efficient than ruminant protein production
- **Waste Management:** Manure handling and processing challenges

Industry Initiatives

- **Carbon Neutral Goals:** Major companies targeting 2030-2040 timelines
- **Circular Economy:** Waste reduction and byproduct utilization
- **Animal Welfare:** Improved housing and management practices
- **Sustainable Feed:** Certification programs and alternative ingredients

Certification and Standards

- **Global Animal Partnership:** Welfare standards gaining traction
- **Rainforest Alliance:** Environmental and social standards
- **ASC/BAP:** Aquaculture standards for integrated systems
- **Company Programs:** Individual sustainability certifications

Consumer Trends and Market Evolution

Consumption Patterns

- **Health and Wellness:** Demand for antibiotic-free, organic options growing 15% annually
- **Convenience:** Value-added products representing 45% of retail sales
- **Transparency:** Traceability and production method information increasingly important
- **Price Sensitivity:** Continued focus on affordability driving innovation

Product Innovation

- **Plant-Based Alternatives:** 8% market penetration, growth slowing
- **Functional Foods:** Fortified products with health benefits
- **Ethnic Flavors:** Global cuisine influences driving variety
- **Premium Segments:** Specialty breeds and production methods

Distribution Channels

- **Traditional Retail:** 52% of sales, stable performance
- **Food Service:** 35% of sales, post-pandemic recovery complete
- **E-commerce:** 13% of sales, fastest growing channel
- **Direct-to-Consumer:** Emerging model for premium products

Regulatory Landscape and Trade Dynamics

Food Safety Regulations

- **Antibiotic Reduction:** 70% of major markets implementing restrictions
- **Pathogen Control:** Enhanced Salmonella and Campylobacter standards
- **Traceability Requirements:** Digital systems becoming mandatory
- **Labeling Standards:** Method of production claims requiring verification

Trade Patterns

- **Major Exporters:** Brazil (36%), United States (28%), EU (15%), Thailand (8%)
- **Import Markets:** China (18%), Japan (12%), Saudi Arabia (9%), EU (8%)
- **Trade Barriers:** Sanitary restrictions and tariffs affecting flows
- **Regional Agreements:** New trade partnerships shaping patterns

Animal Health Challenges

- **Avian Influenza:** Ongoing outbreaks affecting production and trade
- **Disease Management:** Biosecurity investments increasing
- **Antimicrobial Resistance:** Driving alternative health approaches
- **Vaccination Programs:** Expanding to address endemic diseases

Future Outlook and Strategic Recommendations

2026-2030 Projections

- **Production Growth:** 3.8% CAGR reaching 165 million MT by 2030
- **Market Value:** $485 billion by 2030
- **Consumption Growth:** Emerging markets driving 85% of increase
- **Efficiency Gains:** Feed conversion ratios improving 15%

Strategic Imperatives

1. **Digital Integration:** Full value chain digitalization for efficiency
2. **Sustainability Leadership:** Carbon neutrality and circular economy
3. **Disease Resilience:** Advanced biosecurity and genetic solutions
4. **Market Diversification:** Portfolio balancing across segments
5. **Talent Development:** Skills for technology-driven industry

Investment Priorities

- **Automation:** Labor efficiency and consistency
- **Alternative Proteins:** Position in growing segments
- **Emerging Markets:** Infrastructure and market development
- **R&D:** Genetics, nutrition, and sustainability
- **Supply Chain Resilience:** Diversification and redundancy

FAQ

What is the current size of the global poultry industry?

The global poultry industry reached **138 million metric tons** of production valued at **$385 billion** in 2025, maintaining its position as the largest animal protein sector by volume and the fastest-growing major protein category.

Which countries dominate poultry production and exports?

The **United States, China, and Brazil** are the production leaders, while **Brazil and the United States** dominate exports, together accounting for approximately **64% of global poultry trade**. Thailand and the European Union are also significant exporters.

How is technology transforming poultry production?

Technology is driving transformation through:

- **Precision farming** with IoT sensors and data analytics
- **Automation** in processing reducing labor requirements
- **Genetic advances** improving feed efficiency and disease resistance
- **Blockchain** enabling supply chain transparency
- **Alternative feeds** reducing environmental impact

What are the biggest sustainability challenges?

Key challenges include:

- **Greenhouse gas emissions** from production and feed

- **Water usage** throughout the value chain
- **Land use** for feed crop production
- **Waste management** from processing and production
- **Animal welfare** concerns and regulations

How is avian influenza affecting the industry?

Avian influenza continues to cause:

- **Production losses** from mortality and depopulation
- **Trade disruptions** from regional bans and restrictions
- **Cost increases** from enhanced biosecurity measures
- **Investment requirements** for vaccination and prevention
- **Market volatility** from supply disruptions

What is the outlook for plant-based poultry alternatives?

Plant-based alternatives have reached **8% market penetration** but growth has slowed to **6% annually** as consumer interest stabilizes. Traditional poultry companies are launching their own alternative products while focusing on sustainability improvements in conventional production.

Sources:

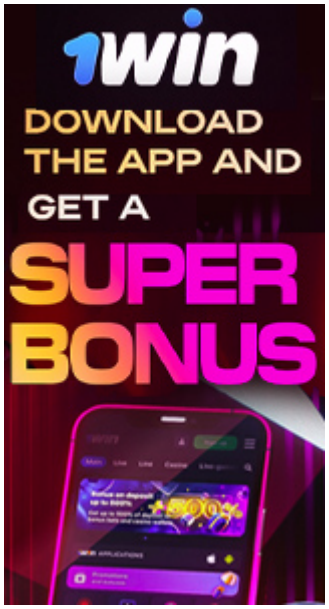
- Food and Agriculture Organization (FAO) – Poultry Statistics
- USDA Foreign Agricultural Service – Poultry Reports
- International Poultry Council – Industry Data
- Company Annual Reports and Investor Presentations
- Rabobank – Protein Sector Analysis
- L.E.K. Consulting – Industry Research
- Academic Research on Poultry Production
- Government Agricultural Statistics

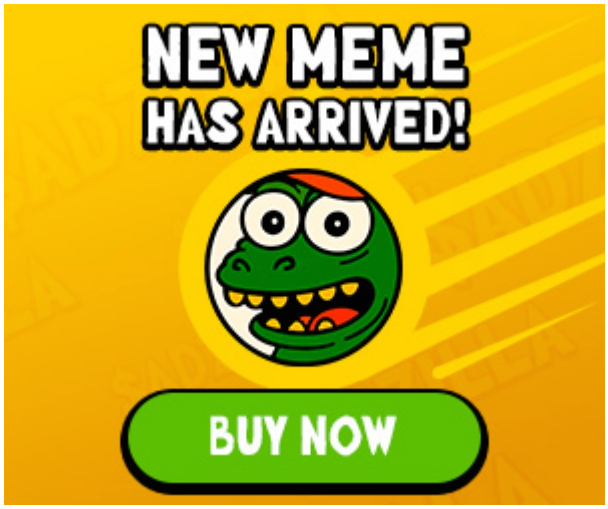
Global Trade, Meat

Poultry Market Reports

Top 10 Milk Producing Countries in the World in 2025

> [Top 10 Fish Consumed Globally: 2025 Consumption Trends and Market Analysis]





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